NORTHERN NEVADA ADULT MENTAL HEALTH SERVICES POLICY AND PROCEDURE DIRECTIVE

SUBJECT: CLOSURE OF OUTPATIENT RECORDS

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ORIGINAL DATE: 03/02/06

REVIEW/REVISE DATE: 3/1/07, 2/18/10

APPROVAL: Rosalyne Reynolds {s}, Agency Director

I. PURPOSE:

To establish a uniform method for closure of outpatient records.

II. POLICY:

All records will be closed when the client has not received services for 120 days. Each program is responsible for closing the chart to their service at 120 days and to notify open programs of chart closure.

III. PROCEDURES:

There are three documentation methods to close an outpatient record:

If a consumer has not been seen by an outpatient clinician (service coordinator, physician, RN, or psychologist), the record may be closed by writing a closure progress note. The note must contain the reason the record is being closed and a diagnosis provided. Notify HIS of this type of closure. EXAMPLE: The consumer was admitted for treatment of depression. Consumer has not been seen in 120 days. Record is closed as of this date.

- 2 If the consumer has been seen by outpatient staff, an outpatient discharge summary (paper form MR-161) is required to close the record. The electronic record must also be closed. Notify HIS of this closure. The clinician must establish whether any further services are going to be needed or scheduled in any program. If not, then all programs must be closed in the electronic chart, including the pharmacy.
- 3 If a record is being closed to one service and kept open for other services, write a progress note to close to just that service. Close the electronic record to that service only.

4. HEALTH INFORMATION SERVICES RESPONSIBILITIES

1. Health Information Services is responsible for creating the packet generated by the admitting clinician.

5. OUTPATIENT STAFF RESPONSIBILITIES

- a. Service Coordinators, nurses, psychologists, PACT, and Mental Health Court and Co-occurring Disorders staff are responsible for closing records to their respective program.
- b. The program who last serves the consumer is responsible for closing the record to all services permanently.
- c. Closing the record when the consumer has never been seen by an outpatient clinician.
- d. Check to see if the consumer is open to services in the computer. If so, close to all services, including pharmacy.
- e. Write a progress note to explain why the record is being closed. Notify HIS of the closure via e-mail.
- f. Closing the record when the consumer has been seen by outpatient staff:
- g. Check to see if the consumer is open to services in the computer. Contact those programs to see if the consumer is to remain open to those programs. If not, close the chart to all programs, including the pharmacy. If so, close only to your program.

- h. Write a progress note to explain why the record is being closed to your service.
 Do not notify HIS of this type of closure IF the record is still open to other outpatient programs.
- i. Closing the record when you are the only program open:
 - i. Close the record to all services including pharmacy.
 - ii. Complete an outpatient discharge summary (paper MR-161).
 - iii. Notify HIS by e-mail of the closure.